



The  
Nottingham  
Building Society



Backed by  
HM Government

# Help to Buy: ISA transfer authority form

Account number:

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## 1. Information about you

Title: \_\_\_\_\_ First name(s): \_\_\_\_\_ Surname: \_\_\_\_\_

Date of birth:       National Insurance number:              (If you have one)

Permanent home address: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_ Postcode: \_\_\_\_\_

Contact phone number (inc. area code) \_\_\_\_\_

## 2. Information about the Help to Buy: ISA (HtB: ISA) you want to transfer

Name of existing HtB: ISA provider: \_\_\_\_\_

Account number:                     Sort code:   -   -

Roll number (if applicable): \_\_\_\_\_

**Please note**  
 The terms and conditions of HtB: ISA products do not allow only part of an account to be transferred. Your existing provider may need you to give them specific information before the transfer can go ahead. Please check with your existing provider if you are not sure about this.  
 Please answer Question 1 or Question 2:

1. If you have **not** subscribed to this HtB: ISA in the current tax year, please tick this box to indicate that you want to transfer the full balance of your existing HtB: ISA.

2. (i) If you have subscribed to this HtB: ISA in the current tax year, please indicate the total subscriptions made in the current tax year: £

2. (ii) Please tick this box to indicate that you want to transfer the full balance of your existing account.

## 3. Transfer authority

I authorise my existing HtB: ISA provider to transfer the HtB: ISA (account number above) to Nottingham Building Society. I authorise my existing ISA provider to provide Nottingham Building Society with any information about the HtB: ISA and to accept any instructions from them relating to the HtB: ISA being transferred.

Depending on the terms and conditions, carry out the transfers as soon as possible - I will accept any consequential loss of interest or charges that may be applied.

Signed: \_\_\_\_\_ Date:       (dd/mm/yyyy)

## 4. Transfer acceptance (your new ISA provider fills this part in)

We are willing to accept this ISA transfer in line with the customer's instructions above, as long as the following conditions are met:

- The transfer proceeds are made up of cash deposits only.
- We receive the transfer proceeds no later than:
- Where the customer has shown above that they want to transfer subscriptions from the current tax year, these must not be more than: £

For the purposes of the transfer of the ISA wrapper under the ISA regulations, the date shown below will be the transfer date.

Date:       (dd/mm/yyyy)

Name of new provider: \_\_\_\_\_